

**REQUEST FOR QUALIFICATIONS**

**FOR THE**

**Technical Assistance for Alternative & Renewable  
Fuel & Vehicle Technology Program**



**RFQ #600-08-602**

**[www.energy.ca.gov/contracts](http://www.energy.ca.gov/contracts)**

**State of California  
California Energy Commission**

**February 2009**

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## **Exhibit**

### A            Evaluation Criteria

## **Attachments**

- |     |   |
|-----|---|
| 1   | Contractor Status Form  |
| 2   | Darfur Contracting Act Form   |
| 3.1 | Disabled Veteran Business Enterprise Certification Application Instructions |
| 3.2 | Disabled Veteran Business Enterprise Program Requirements                   |
| 3.3 | Bidder Declaration Form   |
| 4   | Contractor Certification Clauses  |
| 5   | Customer References   |
| 6   | Standard Agreement Example  |
| 7   | Target Area Contract Preference Act (TACPA) Request                         |
| 8   | Enterprise Zone Act (EZA) Preference Request                                |
| 9   | Local Agency Military Base Recovery Area (LAMBRA) Act Preference Request    |

# **I. INTRODUCTION**

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## **Background**

Assembly Bill (AB) 118 (Nunez, Statutes of 2007) created the Alternative and Renewable Fuel and Vehicle Technology Program (Program), to be administered by the California Energy Commission (Energy Commission). The Program authorizes the Energy Commission to award approximately \$120 million annually as grants, revolving loans, loan guarantees, and other appropriate measures to develop and deploy innovative fuel and vehicle technologies, helping to achieve California's climate change goals.

## **Purpose of this RFQ**

The purpose of this Request for Qualifications (RFQ) is to select a contractor (the Contractor) to provide engineering and technical support services to the Energy Commission to assist in evaluating the technical merits of proposals submitted for funding under the Program. This Program was enacted by the California Legislature through AB 118 (Núñez, Chapter 750, Statutes of 2007), and subsequently amended through AB 109 (Núñez, Chapter 313 Statutes of 2008). The Contractor will also provide technical assistance to the Commission in troubleshooting projects approved for funding under the Program.

The Contractor and any proposed subcontractor(s) performing work under this Technical Support Contract must have extensive knowledge of engineering and the natural sciences, along with consulting experience. Knowledge in some or all of the following disciplines will be required, but not limited to:

- ☐ Electrical power systems such as batteries and motors
- ☐ Combustion processes
- ☐ Fluid dynamics and thermodynamics
- ☐ Chemistry
- ☐ Biological sciences, including fermentation processes and metabolism
- ☐ Solid mechanics

The Energy Commission is seeking a prime contractor representing a team of companies. A single company, and not a group of representatives from different companies, must submit a Statement of Qualifications as the prime contractor. The prime contractor will be responsible for all contract administrative duties, directing team members in all contract provisions, and also participating in technical work assignments.

## **I. Introduction, continued**

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### **RFQ Organization**

This Request for Qualifications (RFQ) is organized into the following sections:

- Section 1 – Provides a summary and administrative overview.
- Section 2 – Provides an explanation of the work to be performed.
- Section 3 – Provides an explanation of the format, documents, and technical expertise to submit a successful Statement of Qualifications.
- Section 4 – Provides administrative detail, including legal requirements of the RFQ.
- Section 5 – Provides an explanation of the evaluation process.

### **Available Funding**

There is a maximum of up to \$400,000 available for the contract resulting from this RFQ. Of this amount, \$200,000 is immediately available. The remaining balance of \$200,000 may be available from fiscal year (FY) 2009/2010 contingent on approval of the Energy Commission's 2009/2010 Budget. Funding shall be subject to the appropriation and availability for that purpose in the 2009/2010 Governor's Budget. In the event funds are not available, the Energy Commission shall have no further liability with regard to the contract. This is an hourly rate plus cost reimbursement contract with a ceiling on the total contract amount.

The Energy Commission reserves the right to reduce the contract amount to an amount deemed appropriate in the event the budgeted funds do not provide full funding of Energy Commission contracts. In this event, the Contractor and Energy Commission Contract Manager shall meet and reach agreement on a reduced scope of work commensurate with the level of available funding.

### **Retainer Contract**

Any contract awarded as a result of this solicitation will be a no-fee "retainer" contract. The selected consultant will be held on retainer and will be assigned work via work authorizations. Work authorizations will be assigned by expertise, or project workload. The Energy Commission makes no guarantee that any or all of the funds will be assigned in any given year.

## **I. Introduction, continued**

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### **Key Activities and Dates**

Key activities and tentative dates for this RFQ are presented below:

<b><u>Activities</u></b>	<b><u>Tentative Dates</u></b>
RFQ release	February 13, 2009
Pre-Bid Conference	February 26, 2009
Written Question Submittal Deadline	February 26, 2009
Distribute Questions / Answers and Addenda (if any)	March 9, 2009
<b>DVBE Advertising Deadline</b>	<b>March 18, 2009</b>
<b>Deadline to submit SOQ by 3:00 p.m.</b>	<b>April 1, 2009</b>
SOQ Discussions with Firms	April 14, 2009
Notice of Selection	April 16, 2009
Cost Negotiations	April 20 – April 30, 2009
Notice of Proposed Award	May 4, 2009
Energy Commission Business Meeting	June 17, 2009
Contract Start Date	June 30, 2009
Contract End Date	June 30, 2011

### **How to Respond to This RFQ**

Responses to this solicitation will be in the form of a Statement of Qualifications (SOQ) according to the format described in this RFQ. The SOQ shall document the Firm's qualifications to perform the tasks described in the Scope of Work found in this RFQ.

### **Whom to Contact**

This RFQ is available through the Energy Commission's Web Site at [www.energy.ca.gov/contracts](http://www.energy.ca.gov/contracts). Questions or clarifications about this RFQ should be directed to:

Sherri Bower, Contracts Officer  
California Energy Commission  
1516 Ninth Street, MS-18  
Sacramento, CA 95814  
Telephone: (916) 654-7093  
FAX: (916) 654-4423

### **Verbal Communication**

Any verbal communication with an Energy Commission employee concerning this RFQ is not binding on the State and shall in no way alter a specification, term, or condition of the RFQ. Therefore, all communication should be directed to the Energy Commission's Contract Officer assigned to the RFQ.

## **I. Introduction, continued**

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### **How to Obtain Further Information**

A Pre-Bid Conference will be held to answer questions. Please call (916) 654-4392 to confirm date, time, and location, or refer to the Energy Commission's Web Site at [www.energy.ca.gov/contracts](http://www.energy.ca.gov/contracts). Prospective Firms are encouraged to attend the meeting to be held on:

**February 26, 2009, 1:30 p.m.**

**Hearing Room B**

**California Energy Commission**

**1516 Ninth Street, Sacramento, CA 95814**

At the option of the Energy Commission, questions posed during the Pre-Bid Conference may be answered either orally or in writing.

**Following are instructions for participation through WebEx, the Energy Commission's on-line meeting service:**

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**COMPUTER LOGON WITH A DIRECT PHONE NUMBER**  
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1. Please go to <https://energy.webex.com> and enter the unique meeting number:  
927 085 694
2. When prompted, enter your information and the following meeting password: meeting@1
3. After you login, a prompt will appear on-screen for you to provide your phone number. In the Number box, type your area code and phone number and click OK to receive a call back on your phone for the audio of the meeting. International callers can use the "Country/Region" button to help make their connection.

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**COMPUTER LOGON FOR CALLERS WITH AN EXTENSION PHONE NUMBER, ETC.**  
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1. Please go to <https://energy.webex.com> and enter the unique meeting number:  
927 085 694
2. When prompted, enter your information and the following meeting password: meeting@1
3. After you login, a prompt will ask for your phone number. **CLICK CANCEL.**
4. Instead call 1-866-469-3239 (toll-free in the U.S. and Canada). When prompted, enter the meeting number above and your unique Attendee ID number which is listed in the top left area of your screen after you login. International callers can dial in using the "Show all global call-in numbers" link (also in the top left area).

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**TELEPHONE ONLY (NO COMPUTER ACCESS)**  
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1. Call 1-866-469-3239 (toll-free in the U.S. and Canada) and when prompted enter the unique meeting number above. International callers can select their number from <https://energy.webex.com/energy/globalcallin.php>

## I. Introduction, continued

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### TECHNICAL SUPPORT

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For help with problems or questions trying to join or attend the meeting, please call WebEx Technical Support at 1-866-229-3239.

System Requirements: To see if your computer is compatible, visit <https://support.webex.com/support/system-requirements.html>

Meeting Preparation: The playback of UCF (Universal Communications Format) rich media files requires appropriate players. To view this type of rich media files in the meeting, please check whether you have the players installed on your computer by going to <https://energy.webex.com/energy/systemdiagnosis.php>

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**Please be aware that the pre-bid WebEx audio and onscreen activity will be recorded.**

### **Reference Documents**

Firms responding to this RFQ may want to familiarize themselves with the following documents available on the Energy Commission website or the Official California Legislative Information website:

- ☐ AB 118 (<http://www.energy.ca.gov/proceedings/2008-ALT-1/index.html>)
- ☐ AB 109 ([http://www.leginfo.ca.gov/pub/07-08/bill/asm/ab\\_0101-0150/ab\\_109\\_bill\\_20080926\\_chaptered.pdf](http://www.leginfo.ca.gov/pub/07-08/bill/asm/ab_0101-0150/ab_109_bill_20080926_chaptered.pdf))
- ☐ State Alternative Fuels Plan (AB 1007 Plan) <http://www.energy.ca.gov/ab1007/index.html>

All above reference documents are on display and available for review in the Energy Commission's Library (Monday–Friday from 8:30 a.m. to 12 p.m. and 1:00 to 4:30 p.m.) located at:

**California Energy Commission  
Library  
1516 Ninth Street, MS-10  
Sacramento, CA 95814  
(916) 654-4292**



## **I. Introduction, continued**

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### **Firm's Responsibilities For Submitting A Statement of Qualifications**

Firms must take the responsibility to:

- ☐ Carefully read this entire RFQ.
- ☐ Ask the appropriate questions in a timely manner.
- ☐ Submit all required responses in a complete manner by the required date and time.
- ☐ Make sure that all procedures and requirements of the RFQ are followed and appropriately addressed.
- ☐ Carefully reread the entire RFQ before submitting an SOQ.

## II. SCOPE OF WORK

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### **About This Section**

In this section, the Energy Commission describes the tasks the Firm (referred to as “Contractor” in the Scope of Work) will be asked to perform under the direction of the Energy Commission Contract Manager (CCM). This section also describes the work assignment process, deliverables, and due dates.

### **Background**

In December 2007, the Energy Commission and the California Air Resources Board (ARB) jointly adopted the *State Alternative Fuels Plan* (AB 1007 Plan) pursuant to AB 1007 (Pavley, Chapter 371, Statutes of 2005). The AB 1007 Plan recommends a combination of regulations, incentives, and market investments to increase penetration of alternative fuels and vehicle technologies into California’s on-road and off-road markets (excluding air, rail, and marine). The AB 1007 Plan includes example pathways to increase use of alternative fuels, while meeting multiple state transportation energy, alternative fuel use, air quality, water quality, global climate change, and other environmental and petroleum reduction objectives.

AB 118 created the Alternative and Renewable Fuel and Vehicle Technology Program, to be administered by the Energy Commission. The Program authorizes the Energy Commission to award approximately \$120 million annually as grants, revolving loans, loan guarantees, and other appropriate measures to develop and deploy innovative fuel and vehicle technologies. Projects eligible for funding include the following, but do not include projects required to be undertaken pursuant to state or federal law, or district rules or regulations:

- ☐ Alternative and renewable fuel projects to develop and improve alternative and renewable low-carbon fuels;
- ☐ Demonstration and deployment projects that optimize alternative and renewable fuels for existing and developing engine technologies;
- ☐ Projects to produce alternative and renewable low-carbon fuels in California;
- ☐ Projects to decrease the overall impact of an alternative and renewable fuels life-cycle carbon footprint and increase sustainability;
- ☐ Alternative and renewable fuel infrastructure, fueling stations, and equipment;
- ☐ Projects to develop and improve light-, medium-, and heavy-duty vehicle technologies that provide for better fuel efficiency and lower greenhouse gas (GHG) emissions, alternative fuel usage and storage, or emission reductions;

## II. Scope of Work, continued

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- ☐ Programs and projects that accelerate the commercialization of vehicles and alternative and renewable fuels, including buy-down programs through near-market and market-path deployments, advanced technology warranty or replacement insurance, development of market niches, and supply-chain development;
- ☐ Programs and projects to retrofit medium- and heavy-duty on-road and non-road vehicle fleets with technologies that create higher fuel efficiencies, including alternative and renewable fuel vehicles and technologies, idle management technology, and aerodynamic retrofits that decrease fuel consumption;
- ☐ Projects that promote alternative and renewable fuel infrastructure development connected with existing fleets, public transit, and existing transportation corridors;
- ☐ Workforce training programs related to alternative and renewable fuel feedstock production and extraction, renewable fuel production, distribution, transport, and storage, high-performance and low-emission vehicle technology and high power electronics, automotive computer systems, mass transit fleet conversion, servicing, and maintenance, and other sectors or occupations related to the purpose of the Program;
- ☐ Block grants administered by not-for-profit technology consortia for multiple projects, education and Program promotion within California, and development of alternative and renewable fuel and vehicle technology centers; and
- ☐ Life-cycle and multimedia analyses, sustainability and environmental impact evaluations; market, financial, and technology assessments performed by a state agency.

Finally, funding mechanisms that may be used by the Program will be based on the stage of development of the funding opportunities, including widespread commercial availability, early market deployment and development for vehicle fleets, consumers, fuel producers, infrastructure owners and plant manufacturers, market niche demonstration and feasibility, application research and development, validation testing, and prototype development.

## **II. Scope of Work, continued**

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### **Task 1: Contract Management**

This is a "Work Authorization" Contract and no work shall be undertaken unless authorized by the Energy Commission through a specific written document called a Work Authorization (WA). WAs specifying the tasks, deliverables and costs shall be used for all work assignments. WAs for technical tasks will be made on an as-needed basis. The specific task(s) and the level of effort for each task will vary from project to project. A fully executed copy of the WA must be obtained from the CCM before work can begin on any WA. Workflow will depend on demand for service. Demand is uncertain and, therefore, there will be no guarantee of work for the prime contractor or any subcontractor.

The Contractor shall manage a team capable of undertaking all work assignments identified in this Statement of Work. All project work performed by the team shall be directed by the CCM.

In the event subcontractors are part of the Contractor's proposal, the Contractor shall manage and coordinate subcontractor activities. The Contractor is responsible for the quality of all subcontractor work and the Energy Commission will assign all work to the Contractor. If new subcontractors are added, the Contractor shall notify the CCM who will follow the Energy Commission's process for adding or replacing subcontractors.

The Contractor's responsibilities under Task 1 include, but are not necessarily limited to, the following:

- 1.1 Attend Kick-Off Meeting. Attend a "kick-off" meeting with the CCM, the Contracts Officer, and a representative of the Energy Commission Accounting Office. The Contractor shall bring its Project Manager, Contracts Administrator, Accounting Officer, and others designated by the CCM to this meeting. The administrative and technical aspects of this Contract will be discussed at the meeting. Prior to the kick-off meeting, the CCM will provide an agenda to all potential meeting participants. The CCM shall designate the date and location of this meeting.
- 1.2 Maintain software compatibility. Software must be compatible with the Energy Commission's software. This means ensuring capability in MS Office programs for PC-type computers or other appropriate task-dependent formats for desktop publishing. MS Office programs include MS Word, Access, and Excel. In addition, the Energy Commission has an Information Management System based on Structured Query Language (SQL). If the Energy Commission's or Division's standards change, the Contractor shall ensure compatibility with the new standard(s). In some of the WAs, it may be necessary to provide information to the Energy Commission in a format that is not compatible. If this is the case, the Contractor shall request an exemption to the electronic file format in writing at least 90 days before the deliverable is submitted. Exceptions to this policy may be granted by the CCM for good cause.

## II. Scope of Work, continued

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- 1.3 Administer work authorizations.
- ☐ Establish and maintain contractual agreements with entities performing the work.
  - ☐ Develop project schedules and assign work to the WA team.
  - ☐ Manage subcontractor activities in accordance with the Subcontractor clauses in this Contract.
  - ☐ Provide oversight and first-level review of reports and documentation.
  - ☐ Comment on the content of products and deliverables.
  - ☐ Ensure that tasks are completed efficiently, on schedule, and within the budget.
  - ☐ Review and approve all invoices and provide audit and accounting services for all WAs.
  - ☐ The Contractor's Contract Manager shall report in a timely fashion any significant variances affecting performance of each WA. These shall be reported immediately along with recommended mitigating actions for consideration by the CCM. Examples of significant variances include inability to deliver products by key WA dates; unavailability of key personnel that will affect timely submittal of deliverables; and key technical issues that would require change in scope, redirection of the effort, or discontinuation of the project.
  - ☐ Coordinate with CCM to close out completed WAs and unallocate remaining balances.
- 1.5 Monitor and track each WA and the overall contract. Ascertain the fiscal status of each WA and the overall contract, prevent accumulation of cost overruns, determine if each WA is on schedule, determine that all deliverables have been submitted and accepted and track the start, progress and closure for each WA.
- 1.6 Monthly progress reports. The Contractor shall submit progress reports by e-mail to the CCM on a monthly basis through the term of the Contract. Each progress report shall address milestones met since the previous progress report; milestones to be met before the next progress report; issues arising since the previous progress report; and proposed resolution of issues. Each progress report is due to the CCM within 15 working days after the end of the reporting period.
- 1.7 Prepare and submit invoices. The Contractor shall prepare an invoice for all contract expenses performed. Each invoice is to be submitted to the Energy Commission's Accounting Office.
- 1.8 Provide a Final Contract Report. The Contractor shall prepare a draft Final Report summarizing the work that took place under this contract and shall include, but not be limited to a listing of all work authorizations, WA number, WA title, amount allocated and amount expended. The report shall be prepared in language easily understood by the public or layperson with a limited technical background.

## **II. Scope of Work, continued**

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The draft Final Report will follow the Energy Commission report format as specified by the CCM. The draft Final Report must be delivered to the CCM at least 90 days before the termination date of this contract. The CCM will review the draft Final Report, provide comments, and request changes as needed. The Contractor will then revise the draft and submit a Final Report as directed by the CCM.

After approval of the Final Report by the CCM, the Contractor shall deliver one original, reproducible 8 ½" by 11" camera-ready master in black ink of the Final Report. Illustrations and graphs shall be sized to fit an 8 ½" by 11" page, readable if printed in black and white. In addition, the Contractor shall deliver an electronic copy (CD ROM or memory stick) of the full text in Microsoft Word file (.doc). The Energy Commission shall maintain but may not necessarily exercise all ownership rights to the Final Report including but not limited to possession, use, reproduction, and publication.

The Contractor shall submit the Final Report along with the final invoice.

- 1.9 Participate in a final meeting. Meet with the Energy Commission to discuss the overall contract and its closeout. The final meeting must be completed during the term of this Contract. The CCM will determine the appropriate meeting participants. At the conclusion of the meeting there will be written documentation of the agreements made during the meeting and a schedule for completing closeout activities.

### **Task 2 - Technical Evaluation of Project Proposals**

The Contractor shall assist the Energy Commission in evaluating the engineering and technical merit of project proposals submitted for possible funding under the Program.

At the direction of the CCM, the Contractor shall:

- 2.1 Review and evaluate Program proposals with consideration to the following:
  - a) Technical feasibility, to ensure that the proposal is viable from an environmental, mechanical, electrical, civil, and chemical engineering standpoint; to assess the proposed project's approach in terms of the likelihood of achieving its stated goals and objectives;
  - b) Economic and financial feasibility;
  - c) Potential volumes of fuel used, petroleum displacement, GHG and air and water pollutant emission reductions, and the likely timing of these results; and
  - d) Cost effectiveness of GHG reduction, petroleum reduction, increased alternative fuel supply, air quality improvements, or other benefits proposed by each proposal.

## **II. Scope of Work, continued**

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- 2.2 Prepare a written report which identifies strengths and weaknesses, and provides an analysis of the proposal's technical merit and feasibility. The evaluation reports will be prepared in draft form for Energy Commission staff review. The Energy Commission will provide written comments to the Contractor and the Contractor will prepare a final version of the report based on these comments.

### **Task 3 - Project Troubleshooting**

All new fuels and technologies encounter challenges and barriers that need constant attention to maintain growth and increase consumer acceptance. The Contractor shall provide technical assistance in troubleshooting and proposing solutions to problems that arise in the development of projects approved for funding under the Program, and assist the Energy Commission in implementing solutions to such problems.

At the direction of the CCM, the Contractor shall:

- 3.1 Assist the Energy Commission in identifying technical problems that may arise for projects. This shall include conducting project site visits; participating in consultation meetings with project developers and vendors; troubleshooting problems; and proposing solutions.
- 3.2 Prepare reports detailing findings of work performed under Task 3.1. The reports shall include:
- ☐ An overview of the project and a description of the technical problem;
  - ☐ A listing of all site visits or meeting attendees, and their role;
  - ☐ Proposed solutions to resolve the identified problem(s);
  - ☐ A recommendation as to the best solution; and
  - ☐ Any other recommendations.
- 3.3 Monitor corrective actions by the project owner to resolve the technical problems which have been identified in the reports (see 3.2). The Contractor will provide a status of the corrective actions as part of the monthly progress reports required under Task 1 of the Scope of Work.

### **III. SOQ Format and Required Documents**

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#### **About This Section**

This section provides Firms with information about how to prepare a Statement of Qualifications (SOQ) in response to this RFQ. Firms must follow all SOQ format instructions, answer all questions, and supply all requested data.

#### **Pricing/Rates Information**

Do not submit any price quotes or bids in your SOQ since this will be negotiated with the top rated Firm.

#### **Required Format**

The following topics constitute the **mandatory order of presentation for an SOQ**. Provide one (1) original and eight (8) copies. The Firm must submit the original and copies in a sealed envelope labeled with the RFQ title and number. Two-sided copying is preferred.

Firms must also submit electronic files of the qualifications on [CD-ROM diskette](#) along with the paper submittal. Electronic files must be in Microsoft Word XP (.doc) format and Excel Office Suite formats. Electronic files submitted via e-mail will not be accepted.

#### **VOLUME 1, Administrative Response**

1. Cover Letter
2. Table of Contents
3. Required Documents and Statements
  - ☐ Contractor Status Form
  - ☐ Darfur Contracting Act Form
  - ☐ Completed Disabled Veteran Business Enterprise Forms
  - ☐ Signed Contractor Certification Clauses

#### **VOLUME 2, Technical Response**

1. Approach to Tasks in Scope of Work
2. Cost Minimization
3. Project Team Organization
4. Project Team Relevant Experience and Qualifications
5. Customer References
6. Examples of Prior Work



### **III. SOQ Format and Required Documents, continued**

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#### **VOLUME 1, ADMINISTRATIVE RESPONSE FORMAT**

##### **Cover Letter**

Each Firm shall submit a cover letter on company letterhead that includes a reference to the RFQ title and number, a statement that the Firm is willing to enter into a contract with the state, and signed by a person having the authority to commit the Firm to a contract.

##### **Table of Contents**

Each SOQ must include a Table of Contents organized in the mandatory order cited previously and with corresponding page numbers.

##### **Required Documents and Statements**

Every Firm must complete and include the following forms with their SOQ:

1. Contractor Status Form
2. Darfur Contracting Act Form
3. Disabled Veteran Business Enterprise (DVBE) Forms (Firms who qualify as government entities are exempt from this requirement)
4. Contractor Certification Clauses

#### **VOLUME 2, TECHNICAL RESPONSE FORMAT**

##### **Approach to Tasks in Scope of Work**

Describe the Firm's approach to providing the services listed in the Scope of Work, highlighting outstanding features, qualifications, and experience.

1. Describe the Firm's approach to contract management and administration of this Contract. This discussion shall highlight past experience as well as effective practices planned to implement this Contract.

How will you ascertain the fiscal status of each WA and the overall contract, prevent accumulation of cost overruns, determine if each WA is on schedule, determine that all deliverables have been submitted and accepted and track the start, progress and closure for each WA? Describe your management information reports.

### **III. SOQ Format and Required Documents, continued**

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Describe your invoice procedures for this type of contract. Discuss how they are efficient and effective, how you will audit charges before you submit them to the Energy Commission for reimbursement and how you will identify and resolve discrepancies.

2. Describe the Firm's approach to evaluating the engineering and technical merit of proposals submitted for possible funding under the Program.

Describe how you will determine the technical feasibility; economic and financial feasibility; potential volumes of fuel; petroleum displacement; GHG and pollutant emission reduction; and cost effectiveness of the proposed benefits.

3. Describe the Firm's approach to identifying and troubleshooting technical problems that may arise during development of Program-funded projects.

Describe the approach to developing proposed solutions for the identified problems and the basis for selecting a recommended solution.

### **Cost Minimization**

Without revealing hourly rates or cost, describe the efforts that the Contractor will take to minimize costs to the Energy Commission in the successful performance of this Contract. For example:

Work Flow Management - Describe the Contractor's experience in developing cost effective methods for handling contract management and subcontractor assignments (i.e., how the task assignment and follow-up processes can be streamlined to allow for more efficient and expeditious handling of all work undertaken through this contract).

In-State Travel Costs - What policy will the Contractor adopt as related to team member time charges when the team member is traveling and/or not working actively on the Contract?

Out of State Travel Costs - It is the Energy Commission's intent to reimburse contractors for airfare within California. If the Contractor and/or team members are located out of state, will the Contractor establish an office in California and/or initiate all travel and related time charges from this California office, and not the out of state office? The Energy Commission is interested in reimbursing the Contractor for active time spent working on this Contract, not travel.

### **III. SOQ Format and Required Documents, continued**

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#### **Project Team Organization**

1. Provide a description of each Firm and key members on the team. Describe the relationship between the Contractor and subcontractors on your team. Indicate any history of a working relationship between the team members noting any significant success stories.
2. Describe the organizational structure of the Firm and the project team; include organizational charts of the Firm and the proposed contract team.
3. Provide the location of the Firm and each of its intended subcontractor's headquarters and satellite office(s).
4. Describe any professional awards for the Firm and any subcontractors.
5. Describe the roles to be fulfilled by each of the staff members of the Firm and any subcontractors.
6. Identify the Project Manager for the Firm who will be the primary contact under this Contract. This person should participate in the discussion session. In addition, at least one person from each technical area should participate.
7. Describe any technical capabilities that would facilitate communicating with the Energy Commission (e.g., internet capability and electronic reports).

#### **Project Team Relevant Experience and Qualifications**

1. Document the project team's qualifications as they apply to performing the tasks described in the Scope of Work. Describe the nature and scope of recently-completed work as it relates to the Scope of Work.
2. Describe job classification, relevant experience, education, academic degrees and professional licenses of the Firm and subcontractor team members.
3. Provide a current resume for all team members listed, and identify the percentage of time each team member will be available to this Contract throughout the period of performance.

#### **Customer References**

Each Firm shall complete Customer Reference Forms. Three customer references are required for the Firm and three customer references are required for each subcontractor.

#### **Examples of Prior Work**

Each Firm shall provide a minimum of two examples of work products similar to the services to be provided under this Scope of Work.

If more than one company will be providing technical support in a task area, each firm shall submit two example products that demonstrate experience in potential work assignments described in this RFQ.

## **IV. RFQ Administrative Requirements**

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### **About This Section**

This section provides the details to submit a successful SOQ, including definitions of important terms, sources of information, submitting the SOQ, confidential information, grounds for rejecting an SOQ, and other administrative details.

### **RFQ Defined**

The competitive method used for this procurement of services is a RFQ. An SOQ is submitted in response and will be scored and ranked based on the criteria in this RFQ. Every SOQ must establish in writing the Firm's ability to perform the RFQ's tasks. The Energy Commission shall conduct discussions and then select the most qualified Firm. The Energy Commission will negotiate an agreement with the selected Firm for compensation which the Energy Commission determines to be fair and reasonable.

### **Where and How to Deliver the SOQ**

A Bidder may deliver an SOQ by:

- ☐ U.S. Mail,
- ☐ in person, or
- ☐ messenger service.

All SOQs must be **delivered** to the Energy Commission's Contracts Office at 1516 Ninth Street, M-S 18, Sacramento, CA 95814, by 3:00 P.M. on the deadline to submit SOQ date. Any SOQ received after 3:00 P.M. will not be accepted. E-mail and facsimile (FAX) transmissions **WILL NOT** be accepted in whole or in part under any circumstances.

### **Important Administrative Details**

#### Firm's Cost

The Firm is responsible for the cost of developing an SOQ and this cost cannot be charged to the State.

#### Confidential Information

No confidential information is allowed to be submitted in your SOQ. Any SOQ that contains confidential information shall be rejected.

#### Darfur Contracting Act

Effective January 1, 2009, all contracts for goods or services must address the requirements of the Darfur Contracting Act of 2008 (Act). (Public Contract Code sections 10475, *et seq.*; Stats. 2008, Ch. 272) The Act was passed by the California Legislature and signed into law by the Governor to preclude State agencies generally from contracting with "scrutinized" companies that do business in the African nation of

## IV. RFQ Administrative Requirements, continued

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Sudan (of which the Darfur region is a part), for the reasons described in Public Contract Code section 10475.

A scrutinized company is a company doing business in Sudan as defined in Public Contract Code section 10476. Scrutinized companies are ineligible to, and cannot, bid on or submit a proposal for a contract with a State agency for goods or services. (Public Contract Code section 10477(a)).

Therefore, Public Contract Code section 10478 (a) requires a company that currently has (or within the previous three years has had) business activities or other operations outside of the United States to certify that it is not a “scrutinized” company when it submits a bid or proposal to a State agency. (See # 1 on Attachment 2)

A scrutinized company may still, however, submit a bid or proposal for a contract with a State agency for goods or services if the company first obtains permission from the Department of General Services (DGS) according to the criteria set forth in Public Contract Code section 10477(b). (See # 2 on Attachment 2)

### Disabled Veteran Business Enterprises

This Contract is subject to a participation goal of three percent (3%) certified California Disabled Veteran Business Enterprises (DVBE) as set forth in Public Contract Code sections 10115, et seq.

### Disabled Veteran Business Enterprises (DVBE) Compliance Requirements

If you are a non-governmental entity, you must have either three percent DVBE participation, **or** you must demonstrate a good faith effort to obtain DVBE participation. It is important that you thoroughly read the instructions provided on Attachment Form 3.1. The DVBE compliance process is as follows:

*Option A* – Commitment to full DVBE Participation – For a Bidder who is a DVBE or who is able to meet the commitment to use identified DVBE(s) to fulfill the full DVBE participation goal.

*Option B* – Good Faith Effort – For a Bidder documenting its completed effort, made prior to the Bid due date, to obtain DVBE participation that may result in partial or no DVBE participation.

Additionally, you may improve your bid status based on your DVBE efforts through the DVBE Incentive Program. The DVBE Incentive Program gives a contractor an opportunity to improve their bid status based on the efforts attained from the DVBE Participation Program.

### “Commercially Useful Function” Requirements for DVBE

A certified DVBE shall provide goods or services that contribute to the fulfillment of the contract requirements by performing a **commercially useful function**.

## **IV. RFQ Administrative Requirements, continued**

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A DVBE is deemed to perform a **commercially useful function** if it does all of the following:

1. Is responsible for the execution of a distinct element of the work of the contract.
2. Carries out its obligation by actually performing, managing, or supervising the work involved.
3. Performs work that is normal for its business services and functions.
4. Is not further subcontracting a portion of the work that is greater than that expected to be subcontracted by normal industry practices.

A contractor, subcontractor, or supplier will not be considered to perform a **commercially useful function** if the contractor's, subcontractor's, or supplier's role is limited to that of an extra participant in a transaction, contract, or project through which funds are passed in order to obtain the appearance of DVBE participation.

### **Notice of Selection**

Subsequent to the SOQ evaluations and discussion interviews, the Energy Commission will post a "Notice of Selection" at the Energy Commission's headquarters in Sacramento, and on the Commission's Web Site.

California Energy Commission  
Contracts Office  
1516 Ninth Street, MS-18  
Sacramento, CA 95814

### **Negotiations**

Pursuant to Title 20, California Code of Regulations (CCR), section 2565 and Public Contract Code (PCC) 6106, within 14 days after posting the Notice of Selection, the Energy Commission will begin negotiations with the top ranked Firm for an acceptable fee (hourly rates). The top ranked Firm will be required to submit a list of rates after written notification of selection. If negotiations with the top ranked Firm fail, the Energy Commission will enter into negotiations with the next highest Firm, and so on.

### **Notice of Proposed Award**

Subsequent to successful negotiations, the Energy Commission will post a "Notice of Proposed Award" at the Energy Commission's headquarters in Sacramento, and on the Commission's Web Site.

California Energy Commission  
Contracts Office  
1516 Ninth Street, MS-18  
Sacramento, CA 95814

## **IV. RFQ Administrative Requirements, continued**

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### **RFQ Cancellation**

If it is in the State's best interests, the Energy Commission reserves the right to do any of the following:

- ☐ Cancel this RFQ,
- ☐ Amend this RFQ, or
- ☐ Reject any or all SOQs received in response to this RFQ

### **RFQ Amendments**

If the RFQ is amended, the Energy Commission will send an addendum to all parties who requested the RFQ and will also post it on the Energy Commission's Web Site: [www.energy.ca.gov/contracts](http://www.energy.ca.gov/contracts) and Department of General Services' Web Site: [www.cscr.dgs.ca.gov/cscr](http://www.cscr.dgs.ca.gov/cscr).

### **Errors**

If a Firm discovers any ambiguity, conflict, discrepancy, omission, or other error in the RFQ, the Firm shall immediately notify the Energy Commission of such error in writing and request modification or clarification of the document. Modifications or clarifications resulting from this notice will be posted on the Energy Commission's Web Site without divulging the source of the request for clarification. The Energy Commission shall not be responsible for failure to correct errors.

### **Modifying or Withdrawing an SOQ**

#### **Withdrawal/Modification**

A Firm may, by letter to the Contract Officer, withdraw or modify a submitted SOQ before the deadline to submit an SOQ. An SOQ cannot be changed after that date and time.

#### **Immaterial Defect**

The Energy Commission may waive any immaterial defect or deviation contained in a Firm's SOQ. The Energy Commission's waiver shall in no way modify the SOQ or excuse the successful Firm from full compliance.

### **Disposition of Firm's Documents**

On the submission date, all SOQs and related material submitted in response to this RFQ become the property of the State. After the Notice of Proposed Award is posted, all SOQs and related materials become public records. In addition, all evaluation and scoring sheets become public records after the Notice of Proposed Award is posted. The original SOQ may be returned to a Firm upon written request.

## **IV. RFQ Administrative Requirements, continued**

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### **Contract Requirements**

See the Standard Agreement sample included in this RFQ.

#### **No Contract Until Signed & Approved**

No agreement between the Energy Commission and the successful Firm is in effect until the contract is signed by the Contractor, approved at an Energy Commission Business Meeting and signed by the Energy Commission Contracts Manager.

### **Conflict of Interest**

Pursuant to 20 CCR 2569, Firms are prohibited from offering, soliciting, or accepting gifts, services, loans, rebates or payments of any kind (such as kickbacks) from any Energy Commission employee.

Restrictions on submissions of proposals:

- a) Contractor shall not submit to the Energy Commission any proposal seeking funding for a project under the Alternative and Renewable Fuel and Vehicle Technology Program, nor shall it advise on or in any way assist in the preparation of such a proposal. Notwithstanding the foregoing, Contractor may bid on a solicitation to provide technical assistance or other services to the Energy Commission in support of any program, including the Alternative and Renewable Fuel and Vehicle Technology Program.
- b) Any subcontractor providing services under the Contract shall not submit to the Energy Commission any proposal seeking funding for a project under the Alternative and Renewable Fuel and Vehicle Technology Program, nor shall it advise on or in any way assist in the preparation of such a proposal, unless it first obtains written consent from the CCM. The CCM will consent to a subcontractor's submission of a proposal for funding only if the CCM determines that the subcontractor's services will not be needed to assist in the evaluation of the subcontractor's proposal or any competing proposal, and that the subcontractor's submission of the proposal will not otherwise create an actual, potential or apparent conflict of interest. Notwithstanding the foregoing, a subcontractor may bid on a solicitation to provide technical assistance or other services to the Energy Commission in support of any program, including the Alternative and Renewable Fuel and Vehicle Technology Program.

The limitations imposed by this section are in addition to that of any other section of this RFQ or the resulting Contract, as well as any statute, rule or regulation of the state of California.



## **IV. RFQ Administrative Requirements, continued**

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### **Firms' Admonishment**

This RFQ contains the instructions governing the requirements for a firm quotation to be submitted by interested Firms, the format in which the technical information is to be submitted, the material to be included, the requirements which must be met to be eligible for consideration, and Firms responsibilities. Firms must take the responsibility to carefully read the entire RFQ, ask appropriate questions in a timely manner, submit all required responses in a complete manner by the required date and time, make sure that all procedures and requirements of the RFQ are followed and appropriately addressed, and carefully reread the entire RFQ before submitting a proposal.

### **Grounds to Reject an SOQ**

An SOQ shall be rejected if:

- ☐ It is received after the exact time and date set for receipt of SOQs.
- ☐ It is considered nonresponsive to the California DVBE participation requirements.
- ☐ It is lacking a properly executed Contractor Certification Clause(s).
- ☐ It is lacking a properly executed Darfur Contracting Act.
- ☐ It contains false or intentionally misleading statements or references which do not support an attribute or condition contended by the Firm.
- ☐ If the SOQ is intended to erroneously and fallaciously mislead the State in its evaluation of the SOQ and the attribute, condition, or capability is a requirement of this RFQ.
- ☐ There is a conflict of interest as stated in this RFQ.
- ☐ It contains confidential information.

An SOQ may be rejected if:

- ☐ It is not prepared in the mandatory format described.
- ☐ It is unsigned.
- ☐ It does not literally comply or contains caveats that conflict with the RFQ and the variation or deviation is not material, or it is otherwise nonresponsive.

## **V. Qualifications Evaluation**

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### **Selection Process Steps**

The Energy Commission will organize an Evaluation Committee whose members have expertise in evaluation of architectural and engineering services. The SOQs will be evaluated as follows:

#### **Fulfillment of RFQ Mandatory Format**

The Contracts Office will first identify those Firms whose SOQs adhere to the mandatory format outlined in this RFQ. Firms who do not follow the mandatory format may be eliminated from the evaluation process.

#### **Evaluation of Qualifications**

The Evaluation Committee will review and score all remaining SOQs based on the Evaluation Criteria in Exhibit A of this RFQ. The preliminary technical score for each SOQ will be the average of the combined scores of all Evaluation Committee members.

#### **Discussions**

The Evaluation Committee shall conduct discussions with no fewer than three Firms regarding qualifications and methods for furnishing the required services. The Evaluation Committee may use patterned questions and/or questions specific to an SOQ to conduct these discussions. The Evaluation Committee may provide the Firms with an advance copy of the questions and/or issues to be addressed, and a format for structured discussions. The Discussions will be scored by the Evaluation Committee based on the criteria specified in Exhibit A.

Upon completion of the discussions, the Evaluation Committee may also make adjustments to the preliminary technical scores. The resulting final scores may result in a re-ranking of the Firms to determine which Firm is deemed to be the most highly qualified to provide the required services. Firms should anticipate travel to the Energy Commission Headquarters for the discussions.

### **How the SOQ will be Scored**

The Evaluation Committee will award points for the technical criteria based on the following considerations.

## V. Qualifications Evaluation, continued

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### **Point Scale**

0-1 Points	<ul style="list-style-type: none"><li>✓ The response is not in substantial accord with the RFQ requirements.</li><li>✓ Has a potential significant effect on the amount paid or net cost to the State or the quality or quantity of the product and/or service.</li><li>✓ Provides an advantage to one competitor over the other competitors. For example, not paying minimum wages.</li></ul>
2-4 Points	<ul style="list-style-type: none"><li>✓ The SOQ states a requirement, but offers no explanation of how or what will be accomplished.</li><li>✓ SOQ does not completely respond to the criteria. Information presented does not provide a good understanding of Bidder's intent, does not give detailed information requested by the RFQ, or does not adequately support the SOQ.</li><li>✓ The response contains a technical deficiency which is an inaccurate statement or reference concerning the how, what, where, or when, which is part of an overall statement or description.</li></ul>
5-6 Points	<ul style="list-style-type: none"><li>✓ Satisfies the minimum requirements and describes generally how and/or what will be accomplished.</li><li>✓ Provides an average understanding of the Bidder's response to the RFQ.</li></ul>
7-8 Points	<ul style="list-style-type: none"><li>✓ Response satisfies the minimum requirements and specifically describes how and/or what will be accomplished in an exemplary manner, using sample products and illustrative materials (i.e. diagrams, charts, graphs, etc.).</li><li>✓ A response which gives a clear and detailed understanding of the Bidder's intent. Response presents a persuasive argument supporting the SOQ.</li></ul>
9-10 Points	<ul style="list-style-type: none"><li>✓ Exceeds the minimum requirements and specifically describes how and/or what will be accomplished in a superior manner, both quantitatively and qualitatively, using sample products and illustrative materials (i.e., diagrams, charts, graphs, etc.).</li><li>✓ Outstanding response with clear, detailed and relevant information exceeding the information requested. Response presents a compelling argument supporting the SOQ.</li></ul>

### **Ranking an SOQ**

After each SOQ is scored, it will be placed on a list, in rank order, with the highest scoring SOQ placed first and the remainder in descending order based on score.

### **Preference Points**

A Firm may qualify for non-technical preference points such as Disabled Veteran Business Enterprises (DVBE) Incentive points. Each qualifying Firm passing the minimum technical evaluation will receive the applicable preference points.

## V. Qualifications Evaluation, continued

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### Target Area Contract Preference Request

The Target Area Contract Preference Act (Government Code Section 4530 et seq.) provides five percent (5%) preference points to California-based companies that perform state contract work in a distressed area. Firms should complete the attachment if they qualify for this preference. If you have further questions or need additional information on this matter, please contact TACPA/LAMBRA Preference Program Group at (916) 375-4609.

### Enterprise Zone Request

The Enterprise Zone Act (Government Code Section 7070, et seq.) provides preference points as an incentive for business and job development in distressed and declining areas of the State. Firms should review the attachment to determine if they qualify for this incentive. If you have further questions or need additional information on this matter, please contact TACPA/LAMBRA Preference Program Group at (916) 375-4609.

### Local Agency Military Base Recovery Act

The Local Agency Military Base Recovery Act (LAMBRA, Government Code Section 7118, et seq.) provides five percent (5%) preference points to California-based companies that perform State contract work in the LAMBRA. Firms should review the attachment to determine if they qualify for this preference. If you have further questions or need additional information on this matter, please contact TACPA/LAMBRA Preference Program Group at (916) 375-4609.

### Disabled Veteran Business Enterprise Incentive Program

The DVBE Incentive program was established pursuant to Military & Veterans Code Section 999.5(2) and Department of General Services' Regulations 2 CCR 1896.98 et seq. The information below explains how the incentive is applied and how much of an incentive will be given.

#### *Incentive Application:*

Award Based on High Score: Incentive points are included in the sum of non-cost Points. Incentive points cannot be used to achieve any applicable minimum point requirements. The DVBE incentive is only applied during the SOQ evaluation process and only to responsive/responsible Firms.

The incentive amount for awards based on high score will vary in conjunction with the percentage of DVBE participation (see "Incentive Amount" below).

Proposed DVBE Participation Level	DVBE Incentive Points Preference
3% - 4.99%	1%
5%+	2%

# EXHIBIT A - EVALUATION CRITERIA WORKSHEET

FIRM: \_\_\_\_\_

BY: \_\_\_\_\_

	Criteria	Weight Factor	X	Point Score (0-10)	=	Weighted Score
<b>APPROACH TO TASKS</b>						
1	Capability of the Contractor's project accounting system to accrue Contractor and subcontractor labor hours and direct expenses; adequacy of MIS reports; capability and tools to track project cost variance against budget	3		10		30
2	Adequacy of the proposed method to prevent cost overruns	3		10		30
3	Adequacy of the Contractor's invoicing procedure	3		10		30
4	Adequacy of the method for tracking Contractor and subcontractor work activities, progress; and schedule variances	3		10		30
5	Adequacy of the process for identifying qualified subcontractors and for establishing subcontract agreements	2		10		20
6	Clarity and logic of the proposed approach to evaluating the engineering and technical merit of proposals submitted for funding	10		10		100
7	Clarity and logic of the proposed approach to identifying and troubleshooting technical problems on current Program-funded projects; approach to developing and recommending alternative solutions	10		10		100
8	Ability to perform research and acquire additional technical information to supplement Contractor and subcontractor knowledge, as needed for thorough and comprehensive evaluations	7		10		70
9	Adequacy of the document preparation and review process to ensure technical quality and readability of report deliverables	3		10		30
<b>COST MINIMIZATION</b>						
10	Effectiveness of proposed methods to minimize project delivery costs to the Energy Commission	5		10		50
<b>PROJECT TEAM ORGANIZATION</b>						
11	Clarity of the Contractor's organization, including lines of authority, reporting and communication	2		10		20
12	Clarity of the team organization, including lines of authority, reporting and communication	3		10		30
13	Clarity of the roles to be performed by each Contractor and subcontractor team member	3		10		30
14	Strength of any previous working relationships between the Contractor and any subcontractors	6		10		60
15	Adequacy of communication capabilities	2		10		20

## EXHIBIT A - EVALUATION CRITERIA WORKSHEET, continued

PROJECT TEAM RELEVANT EXPERIENCE AND QUALIFICATIONS					
16	Strength of resumes describing appropriate education, relevant experience, and time commitment	5		10	50
17	Strength of relevant team experience in analyzing, evaluating, and determining the feasibility of technical proposals related to alternative fuels and vehicle technologies; experience in project troubleshooting	10		10	100
18	Demonstrated experience and knowledge of the alternative and renewable fuels industry, vehicle technology, greenhouse gas reductions, and refueling infrastructure design and technology	10		10	100
19	Demonstrated knowledge of California laws and regulations relating to alternative fuels and technology, air quality regulations, vehicle and engine emission certification, and fuel quality	5		10	50
CUSTOMER REFERENCES					
20	Strength of customer references	10		10	100
EXAMPLES OF PRIOR WORK					
21	Complexity and relevance to this RFQ SOW	6		10	60
22	Comprehensiveness and quality of the analysis and the work products	4		10	40
<b>PRELIMINARY TECHNICAL SCORE</b>					<b>0</b>
SOQ DISCUSSIONS					
23	Demonstrated knowledge of the issues	5		10	50
24	Breadth, depth, and accuracy of the responses	5		10	50
25	Clarity and succinctness of responses	5		10	50
<b>TOTAL SCORE</b>					<b>0</b>
Maximum Possible Score					1,300
Minimum Passing Score (85%)					1,105
<b>Disabled Veteran Business Enterprise Incentive:</b>					
<b>Target Area Contract Performance Act Adjustment:</b>					
<b>Enterprise Zone Act Adjustment:</b>					
<b>Local Agency Military Base Recovery Area Adjustment:</b>					
<b>FINAL ADJUSTED SCORE</b>					

## **EXHIBIT A - EVALUATION CRITERIA WORKSHEET, continued**